

Create and Manage Catalog Items

About this Guide

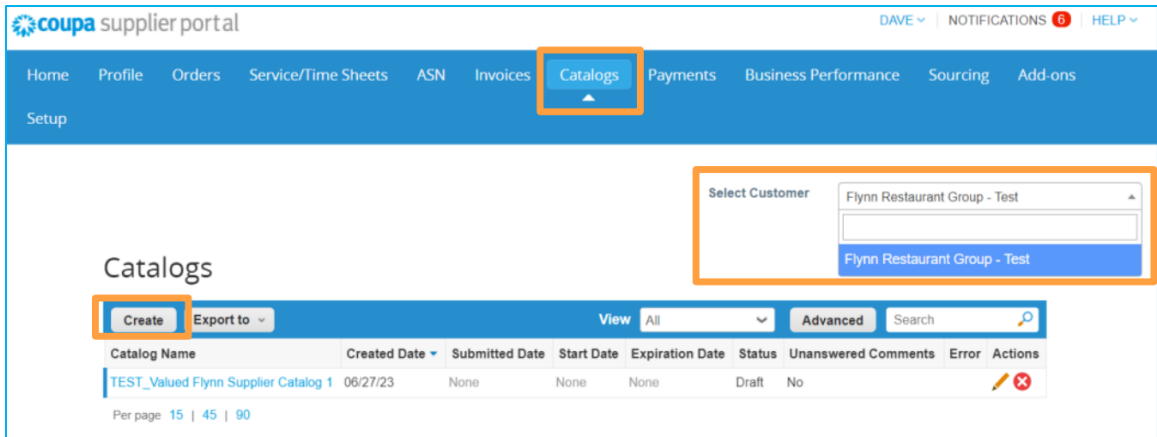
This guide is intended to show suppliers how to create, manage, and update Catalog Items. Updates to catalog items can include updating pricing, adding new items, removing old items, and more. Please coordinate with the Flynn team to understand your responsibility with managing catalogs.

This guide contains the following sections:

- [Creating Catalog Items](#)
- [Single Catalog Upload](#)
- [Bulk Catalog Upload](#)
- [Manage Catalog Items](#)

Creating Catalog Items

1. Login to the Coupa Supplier Portal (CSP). On the main menu, click on the **Catalogs** tab. If you are connected to more than one Coupa customer, select Flynn from the **Select Customer** dropdown menu. Then select **Create**.



2. From the Create screen, you will need to add a **Catalog Name**. Other fields are optional but recommended



- At the bottom of the page, you will see the Items included in the Catalog. To add items to the new catalog you have the option to **Create** new catalogs which will be done one by one or **Load from file** will allow a bulk upload of items and changes.

Items Included in Catalog

Single Catalog Upload

- To create a catalog Item, click on **Create**. Inside under **Catalog Item** you will be asked to fill out required fields such as the **Name** of the item, **Description** of the item, and **Units of Measure (UOM)**. Please note that adding an Image is *strongly recommended*.

- Under the **Supplier Item Attributes**, fill out the required fields that include the **Part Number**, **Price**, and **Currency**. Please fill out as many fields as you can, as this will provide a better purchasing experience for our Flynn team.

- Once all those fields have been filled click **Save**. You will be able to view the Catalog you just created in the table view.

Bulk Catalog Upload

- To mass upload catalog items from a file, click on **Load from file**. Click on the **Download** drop-down and select either the **CSV Plain** option or the **CSV for Excel** option to download a template for you to fill out in order to accurately bulk upload items to the new catalog. (NOTE: The field names in the template match the options presented in the system in Option 1)

Bulk Load Item Updates for Catalog Creation Test

Follow these steps to upload items

- Download the CSV template, or export the current list (Based on the CSV File Field Separator in your Language and Region settings.)
 or
- CSV plain
 CSV for Excel
 file. [Click here](#) for a description of the required and optional fields in the template.
 are mandatory.
 - Each row uploaded will create a new item.
 - Click Start Upload and the system will attempt to load the first 6 rows from your file and show the results.
- Load the updated file
 No file chosen
 Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

- Open the CSV file. Once opened, fill in the mandatory fields marked by the asterisk next to the column name (*). Note that each row will be a different item and will become the details for the catalog.

	A	B	C	D	E	F	G	H	I	J	K
1	Item Type	Supplier Part Num*	Supplier Aux Part Num	Name*	Description*	Price*	Currency*	UOM code*	active*	Item Class	UNSPSC Code
2											
3											
4											

- In the CSV, photos must have a public URL for them to show. Attaching a photo is *highly recommended*.
- Once all the items are added to the file and their mandatory details are included, upload the filled-out CSV file by selecting the Choose File button. Once selected, click on Start Upload.

- Load the updated file
 No file chosen
 Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

- If you get an **Error Generating Sample** after uploading your file, simply click on **Back**, correct the error within the uploaded CSV file, and then re-upload the file. If you encounter an error please reach out to your Flynn contact.

Error Generating Sample

The system found 6 errors in lines when attempting to load the sample rows.

Record	Field	Your Value	Error
Row 1: Item	UOM code	Each	Each is not a valid UOM code.
Row 2: Item	UOM code	Each	Each is not a valid UOM code.
Row 3: Item	UOM code	Each	Each is not a valid UOM code.
Row 4: Item	UOM code	Each	Each is not a valid UOM code.
Row 5: Item	UOM code	Each	Each is not a valid UOM code.
Row 6: Item	UOM code	Each	Each is not a valid UOM code.

- Once your upload is complete, Coupa will scan the uploaded file and show you the **Verify Data** screen so you can check the items extracted from the file.

Verify Data

The first rows of your upload have been loaded. All changes or additions are highlighted in **orange**.
 After reviewing the results, click Finish Upload to continue the upload or Cancel to stop the upload and discard any changes.
 The CSV Field Separator is the Comma (,) character. You can change it in the [Language and Region Settings](#).

	Row 1	Row 2
	New	New
Item Type	Item	Item
Supplier Part Num*	Test	Test
Supplier Aux Part Num		
Name*	Test #1	Test #2
Description*	Test Test	Test Test
Price*	171	171
Currency*	USD	USD
UOM code*	EA	EA
active*	Yes	Yes

- Once you are satisfied with your Data, scroll down and select Finish Upload. An **Upload Completed Successfully** message will appear. Click on the **Done** button to proceed.

The image shows a sequence of two screenshots. The first screenshot shows a dialog box with two buttons: 'Finish Upload' (highlighted with an orange box and a mouse cursor) and 'Cancel'. An orange arrow points to the second screenshot, which shows a message box titled 'Upload completed successfully' with the text 'Upload completed successfully. 9 rows processed, creating 1 new row and updating 5 rows.' A 'Done' button (highlighted with an orange box and a mouse cursor) is located at the bottom right of the message box.

- Lastly, you will be prompted to the Catalog page where you can **Save, Edit** or Publish your Catalog. To publish the newly created catalog, scroll down and locate the Public Catalog Button. Please note that you must publish your catalog in order for Flynn to view it. Flynn Procurement will have to approve the catalog before it is available in the Flynn Marketplace for purchase.

1 Item Changed (2 unchanged)

<p>0 Price Increase</p>	<p>0 Price Decrease</p>	<p>0 Other Fields Updated</p>
<p>1 New Items</p>	<p>0 Deactivated Items</p>	

Save
Publish Catalog

Manage Catalog Items

1. If you would like to edit, delete, update or add a catalog Item, from the home page, navigate to the **Catalogs** Tab. Make sure to select Flynn Group from the **Select Customer** dropdown menu.

The screenshot shows the Coupa supplier portal interface. The 'Catalogs' tab is highlighted in the top navigation bar. Below the navigation bar, the 'Select Customer' dropdown menu is open, showing 'Flynn Group - Supplier Test' as the selected option. The main content area displays the 'Catalogs' section with a table of catalog items.

Catalog Name	Created Date	Submitted Date	Start Date	Expiration Date	Status	Unanswered Comments	Error	Actions
Supplier Test Catalog 1	09/25/24	09/25/24	None	None	Accepted by Customer	No		

2. Select **Create**.

The screenshot shows the Coupa supplier portal interface. The 'Catalogs' tab is highlighted in the top navigation bar. Below the navigation bar, the 'Create' button is highlighted in the 'Catalogs' section. The main content area displays the 'Catalogs' section with a table of catalog items.

Catalog Name	Created Date	Submitted Date	Start Date	Expiration
TEST_Valued Flynn Supplier Catalog 1	06/27/23	None	None	None

3. Select the **Load From File** Button

0 Items Changed (1 Unchanged)

0
Price Increase

0
Price Decrease

0
Rejected Items

0
Other Fields Updated

0
New Items

0
Deactivated Items

Items Included in Catalog

Create
Load from file
Export to
View All
Advanced
Search

Name	Part Number	Status Change	Price	Price Change	Currency	Other Fields Changed	Reject Reason	Actions
No rows.								

Per page 15 | 45 | 90

Items Offered to Flynn Group

Export to
View All
Advanced
Search

Item Type	Name	Description	Part Number	Price	Currency	UOM	Purchasable	Last Submitted to Buyer	Catalog	Actions
Item	Test Item	Test Item	Test Item1	100.00	USD	Each	Yes	09/25/24	Supplier Test Catalog 1	

4. Select the **Export To** drop down and then select **CSV for Excel**. This will export the current catalog items available to Flynn to purchase.

coupa supplier portal MATT | NOTIFICATIONS 3 | HELP

Select Customer: Flynn Group - Supplier Test

Bulk Load Item Updates for Supplier Test Catalog 2

Follow these steps to upload

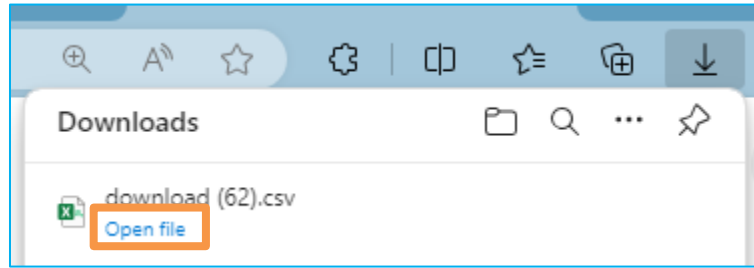
- Download the CSV template, or **export** the current list (Based on the CSV File Field Separator in your Language and Region settings.)

or Export To
- Fill in or update the CSV for Excel (current list) description of the required and optional fields in the template.
 - Fields marked with *
 - Each row uploaded will create a new
 - Click Start Upload and the system will attempt to load the first 6 rows from your file and show the results.
- Load the updated file

No file chosen

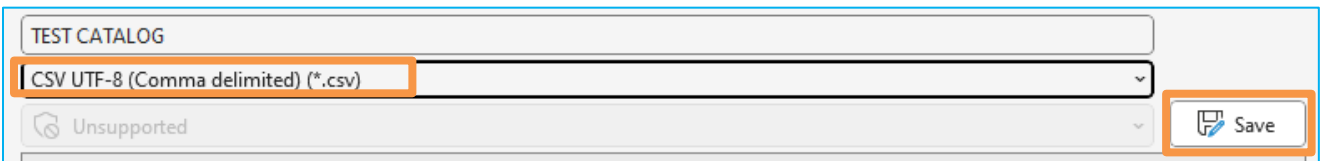
Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

- Once you have the list exported and opened, you can add the items that need to be added as well as make changes to existing items.

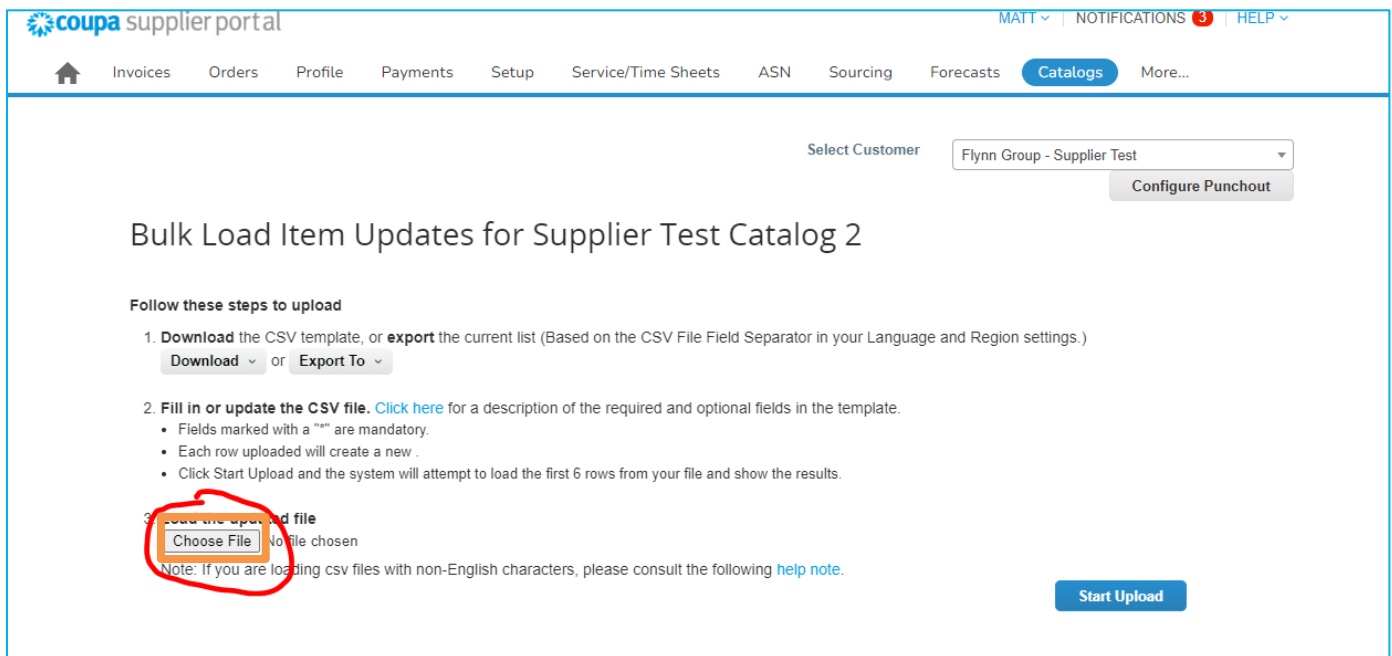


PLEASE NOTE: The only field that should be changed on an item is the price. Please **DO NOT** change any of the item numbers.

- Make the necessary changes or additions to the catalog. Make sure to save the catalog file as a CSV.



- Navigate back to the Coupa Supplier Portal where you last left off. You should see Bulk Load Item Updates. Select the **Choose File** Button and then select the catalog file you just saved to upload.



- Once you have the updated catalog file selected, click **Start Upload**. Once the file uploads, you will be able to review the changes you've made to the catalog.

coupa supplier portal MATT | NOTIFICATIONS 3 | HELP

Invoices Orders Profile Payments Setup Service/Time Sheets ASN Sourcing Forecasts **Catalogs** More...

Select Customer Flynn Group - Supplier Test Configure Punchout

Bulk Load Item Updates for Supplier Test Catalog 2

Follow these steps to upload

- Download** the CSV template, or **export** the current list (Based on the CSV File Field Separator in your Language and Region settings.)
 or
- Fill in or update the CSV file.** [Click here](#) for a description of the required and optional fields in the template.
 - Fields marked with a "*" are mandatory.
 - Each row uploaded will create a new .
 - Click Start Upload and the system will attempt to load the first 6 rows from your file and show the results.
- Load the updated file**
 No file chosen
 Note: If you are loading csv files with non-English characters, please consult the following [help note](#).

- After reviewing your changes for accuracy, select **Submit for Approval**

Select Customer Flynn Group - Supplier Test Configure Punchout

Supplier Test Catalog 2 Edit

Back

Customer Flynn Group

* Catalog Name

Status Draft

Start Date date when catalog prices become effective

Expiration Date date when catalog prices become expired

Currency USD

0 Items Changed (1 Unchanged)

 0 Price Increase	 0 Price Decrease	 0 Rejected Items
 0 Other Fields Updated	 0 New Items	 0 Deactivated Items